

IRIS Training Phase 2

System Views:

Action	Task	Complete
Overview of System views	Trainer introduce the system views and outline the changes in the new programme Talk through system views for IBs and LCGs Caseload fields Set up options for 250 etc.	
Choosing the right system view and setting it as a default view	1. Performance Monitoring – Individual Beneficiaries – set the default view as Active Individuals (including personal information)	
	2. Performance Monitoring – LCGs – change the default view to another view	
Sorting Data in a system view	3. Performance Monitoring – Individual Beneficiaries – sort data by Age Band Youngest to Oldest	
	4. Sort by HP Deprivation Range for Small Areas	
	5. Sort by Age Band Youngest to Oldest and by Gender	

Filtering data:

	Trainer provide rational for Filtering data and demonstrate how to turn on filters Demonstrate how to save a filtered view	
	Demonstrate Filter by - Contains Data or Contains no Data Participants have a go at this filter option on Number of interventions	
Filter by pre-defined category	6. Filter by pre-defined category such as Gender	
	7. Reset Filter	
	8. Filter by Age Band (pre-defined multiple options) Filter by 15-35 year olds (2 bands) Save the views as Test views	
Filtering dates	9. Dates – filter/sort by date of last intervention Oldest to newest Filter by Month	
Custom Filter	10. Filter by Number of interventions	

	<p>11. LDC filter by staff member and save view</p> <p>12. LDC filter by LDC reference and save view</p> <p>LDC/LCDC Filter by emerging need</p> <p>13. LCDC filter by Lot and save view</p> <p>LCDC filter Electoral District(s) save view</p>	
Additional Tasks:	<p>14. Find out how many Individuals (with 2 or more interventions) are in the 'over 55' age bracket</p> <p>15. Find out how many Individuals with highest educational attainment level = Junior Cert or lower</p>	
Export data to Excel	<p>Outline process and get participants to export a list of data.</p> <p>Mention GDPR and retaining data with personal information.</p> <p>16. Export Data list to Excel</p>	

Advanced Find

Advance Find	<p>Add and Remove a column</p> <p>Change the width of a column</p> <p>Change the order of the columns</p> <p>Setting advanced find criteria</p> <p>17. On the default LCG View open advanced find and add the following criteria:</p> <ul style="list-style-type: none"> - Date of last intervention/contact – Older than 3 Months - Remove Columns for 2019 interventions - LDC Reference Contains - View Results - Change Column order - Save the View - Set as the default view 	
Managing Views	<p>Sharing Views</p> <p>18. Share a test view with one other staff member – with the team</p> <p>19. Assigning Views - to one other staff member</p> <p>20. Deleting – delete or deactivate a test view.</p> <p>Deactivate Default Views</p>	

System Charts

System Charts	<p>Trainer provides an overview of the system charts under the different beneficiary types</p> <ol style="list-style-type: none"> 21. From the chart breakdown on Age, drill down into the data for 15-24 year olds and produce two additional charts on Gender and then by nationality. 22. Refresh the system view for individuals and filter by gender and then by age refreshing the system charts each time. 23. Under LCGs Create a Bar Chart that shows the LCGs by Stage of Development on CD Matrix– save the chart 24. Under LCG Supports & Outputs create a chart using LCG ID and Action. Save the chart 25. Share or assign the chart with another team members 26. Create a chart under LCG entity to present the number of LCGs by staff member. Save the chart 27. Share or assign the chart to another staff member 	
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Reports:

Introduction to the reports by trainer		
LCDC Finance Report	Finance Report – Ask LCDC staff to run the report for their lot(s).	
Lot Cost Charged Report	Provide a working example of the report to the participants. Clarify any points.	
Individual Report	28. Run the report and outline usage for files etc.	

Target Group Report	Task: Each lot run the report for their area and go through the data and clarify any issues.	
Action Progress Report	Task – Run the report for the lot and clarify any issues.	
Goal Outcome Report	Task – Run the report for the lot and clarify any issues.	
Lot Summary Report	Task – Run the report for the lot and clarify any issues.	
Clarification on the Mid year Reporting process.	If required	

Data Quality:

Data Quality	Review Dashboards	
LCG Support Plans	Review Lot level data and reports to date	
Registration date	Individual beneficiaries LCG beneficiaries	
Economically Inactive		
PAPs		
Duplicate Records		

Dashboards:

View System Dashboards	Bring the participants through the system dashboards and how to use them	
Facilitate a session on what would work here	Trainer facilitate a session on what would work best for LDCs and LCDCs 10 minutes in small groups to come up with a dashboard.	
	Task 29 - Create a dashboard based on your group discussion Take some examples and develop system views and charts to build the dashboard. Take away other examples and build and share later. Task 30 – Save and share the dashboard with another team member	

Email Alerts		
Evaluation		
Lot level queries		